

Joint Venture Program Guide

Joint Venture is about building relationships with businesses that use our products. In this guide, you'll learn about the features of the program, how to identify customers who will benefit from it, how to present it, and how to make it a success in your store.

Overview

This guide has all the information you need to understand and position Joint Venture to Business customers. The program helps our Business customers get set up, get trained, and stay running through personalized set up, customized training, maintenance and support.

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What is Joint Venture?

The Joint Venture program is a paid membership program that helps businesses get set up, get trained, and stay running. It's our way of helping businesses learn how to use the Apple ecosystem in their environments through custom company trainings and workshops. The program also eliminates critical downtime for Business customers by providing priority technical support, both by phone and at the Genius Bar.

Features of the Program

Every part of Joint Venture is designed to help our business customers get more out of their Apple products, and every feature involves personal service that only our stores can provide. Joint Venture gives business customers peace of mind—whether they're new to Apple or have supported Mac and iOS devices for years.

Affordable Price - Joint Venture is available at a reasonable fee, even for small businesses. For country-specific pricing information, refer to the Joint Venture Pricing Grid in RetailMe.

Set Up – Transfer existing data, including Mail, Calendar, and Contacts.

Company Training – Three personalized, two-hour training sessions per membership year, hosted at an Apple Retail Store.

Joint Venture Workshops – Business customers and Joint Venture members can attend business-oriented one-hour workshops.

Priority Support - Access to an Apple Genius through either a telephone callback or in-store Genius Bar priority support—by reservation on the Joint Venture member website.

Loaner Program – Loan of a Mac when a repair takes longer than 24 hours. The loaner machine contains all of the standard OS X applications.

Tune-Up - Genius-performed software updates, system diagnostics, and cleaning of display and keyboard—by reservation through the Joint Venture member website.

Benefits for Business Customers

Local and Global Support

Our teams provide training, complement our customers' internal support, and offer a first line of defense for troubleshooting. Members receive global support at any Apple Retail Store through Joint Venture.

Note

Joint Venture is not offered or supported in Brazil, Belgium, United Arab Emirates, Macau, or Mexico.

Time is Important

Joint Venture members save critical time by receiving the answers they need—when they need them. Members get started and become productive faster by receiving callback service at their convenience. When the need arises, we keep our customer working even if their computer isn't.

Productive and Self-Sufficient Employees

With Joint Venture, our customers can explore how to use their Apple products for work. We enable them to discover and learn, and we reach out to their extended team when they need help.

Our Best Services, Tailored for Business

When customers buy a new Mac, iPad, or iPhone, and a Joint Venture membership, they get much more than a great product. Joint Venture helps businesses to:

- Get Set Up
- Get Trained
- Stay Running

The Joint Venture Customer Journey

Day 1

- Mac or iOS device is sold in the Product Zone and Joint Venture is activated.
- Help register the new products on the member website.
- Guide the member on a store tour to introduce the team.
- Inform the new member that someone from the Business team will follow up on the new membership.

2 Weeks

- Contact the new member.
- Follow up on the Welcome Call, and extend invitation to visit the member website.
- Invite and schedule member's employees for a Joint Venture Getting Started workshop.
- Ensure that all hardware is registered by Day 30.

3 - 9 Months

- Review member's usage with the Joint Venture Member Dashboard.
- Contact the Admin to answer questions about the program and member website, ensuring that a member knows how to request training, make Genius appointments, and more.
- Invite the customer to a workshop or Business event.

10 Months

- A member can renew as early as 60 days before expiration.
- Contact the member for a renewal conversation, discussing the experience in the program.
- Suggest an invitation to return: Briefing, workshop, and more.

11 Months

- Contact a Joint Venture member before the membership expires.
- Unassigned tasks are generated in Apple CRM as a Priority 2 status, and are due 10 days before membership expires.

Joint Venture and the APPLE Steps of Service

By probing for business needs, you'll quickly have Joint Venture members identifying themselves when they visit the store. After you acknowledge a Joint Venture member, ensure that they've received a personalized warm welcome and are assisted promptly.

When you position Joint Venture to a customer who's new to Apple Retail, explain the program in detail. Capture a Business Introduction, and note that Joint Venture is a topic of interest.

Probing for Joint Venture Needs

Remember, don't make decisions for customers based on your own perceptions. A few good questions that help you better understand your customer include:

"How will you train your employees on...?"

"What kind of remote support do you or your employees need?"

"When or if one of your devices need service, are you able to still do business without them?"

Positioning

Time is critical with every Genius Bar customer. When you discover that you have a Business customer at the bar, remember to probe for potential Joint Venture needs.

Remember to use the Joint Venture queue under "Reservations" to track Joint Venture appointments and ensure they are prioritized appropriately.

Could they use a loaner?

"If it takes more than a day to repair a broken computer, how will you or your employees continue to work?"

Could they use a Genius Callback?

"If something happens to one of your Mac computers—for example, if your mail isn't connecting—how will that affect your productivity?"

Member Website Demo

Any employee can log into the Joint Venture website on a Front of House computer using their AppleConnect to demonstrate how to schedule Remote Genius Callbacks, Genius Bar reservations, Setups, Tune-ups and Training.

Explain how the customer's employees can select a preferred store anywhere in the world to receive service. If you happen to demo scheduling a Remote Genius Callback, make sure to cancel it before you end the demo. It is a live queue.

Joint Venture and You

Specialists

- Understand and explain the benefits of Joint Venture.
- Complete the purchase of Joint Venture.
- After purchase, complete a Joint Venture activation with the customer.
- Deliver Joint Venture website demos with business customers.
- Deliver Personal Setup sessions if Data Migration is not required.
- Welcome Joint Venture members back to your store.

Creatives

- Present workshop content in partnership with the Business team.
- Add next month's workshops to the website schedule before the 15th.
- Collaborate with the Business team, Joint Venture customers, and plan customized company training, ideally during quiet times at the store.

Family Room Specialists and Geniuses

- Greet Joint Venture members at the Genius Bar and provide them with priority support.
- Conduct Joint Venture setup within 24 hours on all purchases made by members. Setup occurs in the Genius Room or at a designated data transfer area in your store. Call the customer when the equipment is ready.
- Provide loaners when we need to keep computers overnight (Loaners not available in Turkey)
- Remote Genius: Provide an exceptional Genius Bar experience over the phone.

Joint Venture and the Business Team

The Business team is responsible for the customer experience that we—as an entire store team—have worked so hard to create.

We play a big part in keeping our customers excited about their year-long commitment by staying in touch regularly—not only at activation and just before renewal. We facilitate participation in our store programs and services, so our members receive the full benefits of Joint Venture and are more likely to renew

Timing is Everything

Thoughtful preparation and communication takes into account Briefings and Events. Use Tasks in Apple CRM to ensure the cadence of communication is regular and expected. Make a welcome call within two weeks after activation. Continue to have regular communication throughout the year at quarterly intervals.

Data Counts

Effective member management begins with team diligence and commitment for quality data in our systems. Linking key customer data between Joint Venture, Concierge, and Apple CRM enables you to have quality conversations with your members.

Prepare Using Systems

- Qualify customer accounts in Apple CRM.
- Enter Joint Venture Member ID into Apple CRM Sales Account.
- Enter Apple CRM Sales Account ID into Concierge profile.
- Review Joint Venture Dashboard and Apple CRM to analyze member activity

Stay In Touch

- Make welcome calls to set up and validate program benefits for new Admin members.
- Expand member awareness of Business services
- Discuss program activity in Dashboard
- Schedule Briefings that move customer forward
- Confirm renewal plans with expiring member
- Add notes to Apple CRM Sales Account.

Prepare for the Call

Exercise your loyalty call skills and communicate regularly to nurture your customer relationships. These actions build strong collaboration that differentiates Apple Retail from others.

Practice your discovery questions. Aim to create a meaningful conversation with every member. Refresh your memory about the customer. Review the most recent Business Brief, purchase history, and notes in Apple CRM and utilization in the Joint Venture Dashboard.

Set Clearly Defined Next Steps

- Set clear expectations to discuss future needs and program use during the follow-up call.
- Email resources and schedule a follow-up conversation. Remember to email only approved customer-facing materials.
- Confirm the next task is scheduled in Apple CRM for a loyalty call to discuss needs.
- Update the member's Apple CRM profile with notes from your conversation.

How do you envision success?

We work now to see results over time, so knowing what to look for is important to measure our efforts and impact:

- The number of tasks created to assign calls and number of tasks completed.
- Incremental increase in pipeline opportunities.
- Increased use of services.
- Renewed Joint Venture memberships.

Joint Venture and Store Leadership

Both customers and your store's teams rely on your leadership in Joint Venture. For the program to be a success, you must be proactive with Joint Venture as a part of both your store and your market.

Instill confidence in your Red Zone—the key to successful interactions with customers is rooted in the APPLE Steps of Service. Encourage your Family Room to focus on business customers and present Joint Venture's benefits. Ensure that your Business team is engaged with the entire store.

Primary Responsibilities

- Practice positioning the benefits of Joint Venture with your team.
- Know the responsibilities of each team's role in the program.
- Become familiar with your Joint Venture members.
- Share successes and opportunities.

Business Managers

Encourage teams to promote the program within the store. Share feedback about training classes from Joint Venture members with your store's teams and leadership.

Promoting Awareness

Making customers aware of Joint Venture is not solely the Business team's responsibility. Remember to explore the positioning of the teams throughout the store, and offer feedback when appropriate. Some questions to think about include:

- "Can every team member in your store accurately describe the benefits of the Joint Venture program to our customers?"
- "Does your store team understand how Joint Venture engagement improves customer loyalty?"
- "Does your team regularly identify Joint Venture members in your store?"
- "Does the team ask customers how they plan to set up their new products, and train and support their employees?"

Processing Joint Venture in EasyPay

In addition to selling Joint Venture through Retail SSO, it can also be sold in-store through EasyPay. To process a new Joint Venture membership in EasyPay, follow these steps:

1. Obtain a new Joint Venture sleeve and membership card.
2. Scan the UPC for a new membership on the card, or search for Joint Venture in Item Inquiry. EasyPay prompts you for the Joint Venture member number.
3. Scan the membership number barcode.
4. Choose one of these options:
 - Complete the sale of Joint Venture.
 - Add additional systems.
5. Link the sale to a Business Introduction or existing Business profile.
6. Choose Tender the transaction with a proper payment type.
7. Record the customer's name and mobile phone number, which is required. Request an email address as well.
8. Insert the card into the Joint Venture welcome kit, then present it to the customer.

Note

Steps 1 through 8 do not activate the Joint Venture membership; these simply get the process started. Additional information is required.

Membership Activation

After a membership purchase is processed in EasyPay, each customer receives a confirmation email with a prompt for activating Joint Venture membership. You should help customers get started by activating their memberships in the store when possible.

To help a customer activate the membership:

1. Visit jointventure.apple.com/activate.
2. Enter the activation code found on the back on the membership card.
3. Link the membership to the customer's Apple ID.

For easier tracking, encourage your customer to use his or her preexisting Apple ID for Joint Venture. If that's not an option, use the link to create a new Apple ID for your customer.

Membership is valid from the date of customer activation.

If a customer doesn't activate their Joint Venture membership at the time of purchase and loses their membership card, use Concierge Admin and a copy of their POS receipt to retrieve the membership activation code.

Welcome Email

After the membership is activated, and an Admin member is registered, additional members can be invited to join the program. They receive a welcome email that invites them to the website.

Member Website

We work with Joint Venture members from the beginning to ensure that all their new products are properly set up and ready to use. The employees of your Joint Venture member can also quickly set up their own devices when they access a profile that contains all of the company's settings.

Remind Joint Venture members that they can access the member website on any Mac or PC using Safari, Firefox, or Chrome.

Website Demo

Provide customers with an overview of the Joint Venture member website, including where to schedule a Remote Genius Callback, Genius Bar appointment, Setup, Tune-Up, and Training.

Explain the concept of the preferred store, and how every employee using the membership can select a store anywhere in the world to receive help and service.

Adding Customer Information to Systems

After you process the sale and activate your customer's Apple ID on the website, attach the membership information to the appropriate locations:

- Add the membership number and expiration date to the customer's Apple CRM profile.
- Add the Apple CRM Sales Account ID to Concierge Admin.

Types of Members

The Joint Venture member website has two levels of permissions: Admin and Employee. Its features vary, depending on how you access the site.

To show the features of Admin-only functionality, you will:

- Show the customer how to request a Company Training, and set expectations about the timing for in-store training.
- Click the User tab to show a customer how to Add a User. Click the Systems tab to show a customer how to add Apple products.
- Click the Activity Summary tab to show a customer all the possible activities the website tracks.

Features by Member Type

Admins:

- Sign up for a Joint Venture Membership.
- Add Users.
- Register systems.
- Request a set up.
- Book a tune-up.

Employees:

- Request a set up.
- Book a tune-up.

Admin-only Functions

Naming Systems

Admin users name the systems. They can associate a registered system with an employee (for example, “Kevin’s System”), or use a title or function (“Human Resources System”). Users are employees who work for a member company and can use Joint Venture program features.

Admin users may invite as many users as they want. However, systems and products must be registered in the Systems tab of the Joint Venture member website to be covered in the program.

- On the Joint Venture member website, click the “Systems” tab.
- Select an empty hardware slot, then click the “Add (+)” button.
- Enter the serial number for the device, then click “Enter.”

Adding Users

Enter information for each user. An invitation is sent to each user to activate membership. Only users who are designated as Admins can modify users or systems.

1. On the Joint Venture member website, click the “Users” tab.
2. Click the “Add a User” button.
3. Enter the user’s information. To allow access to Admin features, select the checkbox. Click “Save.”

Notifying Employees

Admin members can notify employee members of upcoming training, setups, and events with the Joint Venture website’s message system. When members log in, they immediately see their messages.

Admin members can post messages to employee members using these steps:

1. On the Joint Venture website, click “Compose your message.”
2. Compose the message, preview it, then submit it.

Remote Callback

With Remote Genius support, a Joint Venture member can use the Joint Venture member website to request a callback from a remote Genius and get help without leaving the desk. If a problem can't be resolved by phone and requires a hardware repair, the member can choose from these options:

- If parts are available, the member brings the equipment to a Genius Bar.
- If parts aren't available, the member waits for a confirmation call when parts arrive at the preferred store, then brings the equipment to the store.

Genius callbacks are available in 30-minute sessions, Monday through Friday, from 8:00 a.m. to 8:00 p.m. in the member's time zone. Keep in mind, the services are exactly the same as we offer at the Genius Bar in store.

To make a remote Genius callback appointment, members can follow these steps:

1. From the main page on the Joint Venture member website, click "Speak with a Genius".
2. Select a convenient time for the Genius to call, then enter a description of the issue.
3. After confirming, create a calendar appointment by clicking the calendar icon.

Call Sooner Feature

When scheduling an appointment to speak with a Genius, the customer may request to be called before their scheduled appointment time if an earlier time becomes available.

Note

At this time, the options available to schedule remote callbacks are through Concierge Admin and on the Joint Venture website.

Note

The Call Sooner feature improves appointment availability for the overall member community. When a customer is called sooner than their scheduled appointment, the original appointment is released for others members to select.

What is a System?

A system is a set of products for an employee, location, or group. A single system can include a Mac, iPad, iPhone, iPod, and two displays. Joint Venture system registration is important to ensure customers' equipment is covered by the program.

Adding Additional Systems in EasyPay

To add additional systems to a customer's Joint Venture membership in EasyPay, follow these steps:

1. Go to the EasyPay main menu.
2. Tap on the "+" button and choose Joint Venture. EasyPay requests the customer's member number.
3. Enter or scan the existing membership number.
4. Review the membership details. You see the company name, contact, current systems registered, and expiration date.
5. Choose an option:
 6. Joint Venture Additional System
 7. Additional Training
8. Choose the quantity, then enter the details when prompted.
9. Process the transaction with the payment type.
10. Record the customer's name, email address, and mobile phone number, which are required. An activation code is sent to the email address provided.

Prorated Systems

EasyPay automatically determines the pricing for additional systems based on the systems' date of purchase. If systems are added after the initial purchase, the prorated amount for purchase is displayed.

Registering Previous Purchases

Members may add previously purchased equipment to the program even if it was purchased elsewhere. However, they must add the equipment within 30 days of purchasing Joint Venture.

After 30 days, only products purchased directly from an Apple Retail Store, the Apple Online Store, or Business Telesales Team may be added. These products must be added manually through Concierge Admin. (See the Concierge Admin User Guide.)

Note:

Members may register an iPhone device—whether a direct or indirect purchase—to their membership through the website at any time.

Get Set Up

Helping our customer's get set up is more than just showing them the Joint Venture member website. If Data Migration is required, help the member to partner with a Genius by scheduling a set-up appointment through its member website.

Review the following steps to ensure you've given the customer the best experience of getting set up:

- An amazing out-of-the-box experience
- Guided tour of the hardware
- Personalization of the product
- Navigating Joint Venture member website
- Invitation to return

Setup with Data Migration includes:

- Transferring files from the member's old computer—Mac or PC
- Installing hardware purchased from Apple
- Setting up Mail, Calendar, and Contacts
- Connecting to Microsoft Exchange, if applicable
- Setting up and reviewing the Joint Venture member website

Note:

For technical information about setting up a member's computer with Microsoft Exchange, take the "Connecting to Microsoft Exchange Servers" lesson in RetailMe.

For any Family Room team member, use the following steps for a Data Migration setup:

1. Help the Joint Venture member to complete the setup form.
2. Ask the member to sign a Personal Setup authorization form.
3. Transfer the setup record to iRepair, then print the paperwork—including the authorization form.
4. The assigned staff completes setup in the designated area in the Back of House.
5. Call the member when the equipment is ready for pickup.
6. Give a product tour if the member is interested after arriving to pick up the product.

Get Trained

Workshops

Joint Venture offers business customers workshops and events to help them get the most out of their Apple products. While tailored for our Joint Venture members, all business customers can attend. Register those customers on the backend in Concierge Admin. Every store should schedule at least one Joint Venture workshop per week.

Prepare

- Schedule Joint Venture workshops in Concierge.
- Choose a topic-qualified Creative who has One-to-Many training to deliver the workshop.
- Schedule the workshop between 8:00 a.m. to 10:00 a.m. when possible.
- Hold workshops in the Family Room or Briefing Room—where available.

Spread the Word

Regularly contact Joint Venture members who would be interested in upcoming workshops:

- Follow up with email or call the registered members within 24-48 hours before a workshop to remind them of their appointment.
- Update your team regularly during Daily Downloads. Use internal email, RetailMe, and postings in the Back of House to ensure everyone knows when all events are happening.

Workshop Topics

Use the following resource to view a full list of workshop topics available to Joint Venture customers:

RetailMe > Materials > Business > Joint Venture > JV Workshop Guide

Company Training

Joint Venture memberships include three personalized, 2-hour company training sessions each year. A company's Admin requests these sessions through the company's Joint Venture member website, then receives an email that confirms the request has been received.

The content we use to deliver Joint Venture workshops is the same as what we use to create a customized training session for companies. Remember to include time for participants' questions.

Company trainings are:

- Facilitated in the store by a topic-qualified Creative.
- Designed for up to eight company employees per session.
- Scheduled at least three weeks in advance to customize the content and staffing.

Members can purchase additional 2-hour sessions for \$299 each. These sessions are scheduled and planned just like regular sessions. They must provide payment on the day of the training.

Joint Venture Training is not viewable in Mobile Concierge; you'll want to inform the Leader on the Floor to expect your Joint Venture customers.

Note:

Joint Venture Training is not viewable in Mobile Concierge, and you'll want to inform the Leader on the Floor to expect your Joint Venture customers.

Team Responsibilities

When a store receives a Company Training request, a Business team member should contact the member to schedule a joint planning call with the Creative to customize the training. Details include:

- Available dates and times - to confirm later.
- Description of the attendees – specific department or cross-functional group.
- Skill Set – level of detail required to meet learning goal(s).
- Training contact – name of the main contact who's attending the training.
- Specific objectives and topics – what participants need to learn.

Business Team

- Own the Joint Venture member relationship, updates Apple CRM, welcomes customer.
- Coordinate the planning call and training with Creative team.
- Confirm the training in Concierge Admin.

Creative Team

- Assigns a qualified Creative to the company training joint planning call.
- Schedules the Creative for the call and the training.
- Attends the planning call, creates training agenda, delivers training.

How we work together to coordinate Company Training:

1. Business team partners with Lead Creative to schedule a planning call with our team and the company.
2. Business team and Lead Creative connect and agree on the scheduled training date options.
3. Allow 30 minutes for the planning call. The Creative facilitating the training should allow 30 minutes to create the Joint Venture company training agenda.
4. Business team emails the customer with confirmation of training date, time, and agenda.
5. Two days before the training, the Business team calls the Joint Venture member to confirm the date and time, provide directions, and verify the number of attendees and any hardware the company should bring for employees during the session.
6. On training day, a Business team member is there to welcome, seat Joint Venture training customer(s), and introduce the Creative.
7. Creative facilitates planned training. If available, a Business team member should be present to uncover possible opportunities.
8. Business team member concludes session with a fond farewell and next steps if needed.
9. Business team member creates and shares recap if necessary. The recap is attached in Apple CRM.

Stay Running

Priority Support

Having priority support means that Joint Venture members have direct access to Geniuses over the phone and a separate queue for in-store appointments. These Geniuses are trained — just as the Geniuses are trained for the Genius Bar — to resolve technical issues within a specific range, known as the scope of support.

A Remote Genius will:

- Provide the same level of support that Geniuses at the Genius Bar do.
- Determine if the issue is related to software or hardware.
- Work with the member to diagnose software issues and resolve them.
- Assist with hardware issues by working with the member's preferred Apple Retail Store to check for available parts, estimate repair time, and set up Genius Bar reservations for a seamless member experience.
- Provide hardware support for Mac mini with OS X server—Geniuses do not support server software or the user interface.

Joint Venture members may also:

- Schedule a Genius Bar appointment through their member website.
- Receive a loaner MacBook Pro or MacBook Air for repairs longer than 24 hours.
- Book appointments for a Tune-Up at any time.

At the Genius Bar, the team will:

- Greet and assist Joint Venture members.
- Check the Joint Venture queue to assist and greet members at the Genius Bar. Remember, the Joint Venture queue is separated in list view.
- Acknowledge any special business needs that your Joint Venture member has.
- Prioritize Joint Venture member repairs, offering “while you wait” service whenever possible.

Loaners* and Tune-Ups

*Loaner Program (for Mac only)**

If members need a computer while theirs is being repaired, we loan them a MacBook Pro or a MacBook Air loaded with the current version of OS X. Using their Apple ID, they can re-download applications previously purchased from the Mac App Store. They can also restore from a Time Machine back-up or download files from a cloud storage solution. With these options, even if one of their machines is temporarily down, their business won't be.

For more information, use the Loaner Process User Guide at:

RetailMe > Materials > Business > Joint Venture > Joint Venture Loaner Guide

Tune-Ups

To help members keep their Apple products reliable, secure, and easy to use, we'll run system diagnostics, update software, and even clean their keyboards and displays. We ensure that our members' equipment helps them work at their full potential.

Reservation Requests

1. A member schedules a reservation through the Joint Venture website, or store teams make a reservation through Concierge.
2. The member receives confirmation for the upcoming reservation.
3. The member brings their equipment to the store and checks in at the Genius Bar.
4. The member receives a call from a Genius when the equipment is ready.

Note:

*Loaner program not available in Turkey.

Joint Venture and AppleCare

All Apple hardware includes a one-year limited warranty. To extend the hardware coverage, customers can purchase the AppleCare Protection Plan or AppleCare+.* For more information, visit <http://www.apple.com/support/products/>.

AppleCare is the perfect complement to any Joint Venture membership. It provides customers with hardware coverage and software support, while Joint Venture extends members' relationship and engagement with the store. Customers can also get support on Servers via Enterprise AppleCare Support as well.

Note:

*AppleCare+ not available in all countries.

Membership Renewal

Eligibility

Memberships that expire within 60 days or have already expired are eligible for renewal. Members can renew for one year an unlimited number of times.

Requirements for Renewal

- Renewals require a minimum of one base membership—for up to five systems.
- At the time of renewal, members can renew additional systems—or add more—beyond the five covered in the base membership.
- If a member renews fewer systems than are currently in use, the Business team must manually update registered hardware in Concierge Admin.
- At renewal, registered Apple products may replace other eligible Apple products.
- Unused training hours do not roll over from year to year.

Renewing Online or In the Store

- Renewing through the Joint Venture member website: An Admin may renew only base memberships and additional systems.
- Renewing in the store: An Admin may update the number of additional systems or update registered hardware.

Target Completion for Renewal Conversation

- Business Manager assigns renewal tasks in Apple CRM to the Business Specialist responsible for the account relationship.
- Complete Renewal Task in Apple CRM 10 days before membership expires.
- Outreach should include 3 attempts by phone and a follow-up email—see Email Guidance.

Expiring Joint Venture Memberships

Using the Global Business Intelligence Member website

1. Log in to the GBI member website to access the Joint Venture dashboard.
2. Verify that the store scope is properly set so that you see only memberships that are managed by your store.
3. Search for memberships that expire 60 to 120 days from today.
4. Search for memberships that expire starting today and 60 days from today. You can also use the memberships that expire within 60 days in the attrition report.
5. Use the attrition report at the top of the member website to search for expired memberships.

Preparing for the Call

Renewal calls are most effective when Business teams nurture the customer relationship throughout the year, not only at activation and just before renewal.

1. Practice your discovery questions to have meaningful conversations with every customer. Be prepared to handle these situations:
 - Customer wants to renew in person
 - Customer says membership isn't needed
 - Customer can't afford to renew at this time
2. Refresh your memory about the customer.
 - Review the member's usage in the Joint Venture Dashboard
 - Review purchase history and notes in Apple CRM

Processing the Renewal

You can renew Joint Venture memberships using the Transaction Manager tool in EasyPay and following these steps:

1. Log in to EasyPay.
2. Link the purchase to the company's Business Profile
3. Access the Joint Venture Transaction Manager by tapping the "+" button, then choosing Joint Venture—or scan any Joint Venture SKU. Transaction Manager prompts you for a membership number.
4. Enter the number of the membership you want to renew.
5. EasyPay verifies the membership number, then displays more detailed membership information, including the SKUs available to purchase. If renewal is not an option, the customer is probably not eligible.
6. Choose the SKUs that the customer wants to purchase. Adjust item quantities by tapping the arrow next to the item description. Tap Next to return to the transaction screen.
7. Process the transaction as you would for any EasyPay sale.

Renewing Different Hardware

When a member renews hardware that is different from the hardware that they're currently using, a member of the Business team must manually update the registered hardware in Concierge Admin.

Contact the Joint Venture member to determine what hardware should be updated or deleted from the membership. To locate hardware in Concierge Admin, you need their serial numbers.

How to locate a Member in Concierge Admin:

1. Log in to Concierge Admin.
2. Tap "Search Customers," then search for the member by membership number.
3. Choose the business name in the listed results to access the Joint Venture membership details.

Updating or Deleting Registered Hardware

In the Hardware tab, you can delete and update all registered hardware:

1. Delete the hardware that you want to remove from coverage.
2. Update systems fields as needed.

Reporting

With the Joint Venture Dashboard, we can see the activity of our customers and understand their engagement.

Dashboard Features

You can examine helpful customer information at gbiportal.corp.apple.com, including:

- Details of active memberships
- Inactive memberships
- Memberships nearing expiration and expired
- Sales performance review
- Market performance review
- Features used

Business team members can visit accessmanager.apple.com to submit a request for access to the Joint Venture dashboard.

Measuring and Sharing Success

The Customer Experience

Selling a membership is only the beginning—our teams need to know how members are using the benefits of the program. Success is reflected by members who benefit from the program and renew their memberships because they recognize the value.

NetPromoter

NetPromoter is our gauge. Business NPS provides feedback from customers who made a purchase for business use. Business teams can use scores and comments to highlight areas of celebration and opportunity for the store team.

Note:

Store leadership must investigate Detractor comments within 48 hours.

Joint Venture Engagement

Customer engagement can be measure by answering two important questions:

Are your memberships activated?

By activating your customers' memberships on the same day as their purchases, you've made a commitment to starting their experience and setting them up for success.

Are your members using the program's features?

Training requests and Genius appointments help indicate how well members are using the program.

Increasing Customer Loyalty

The most powerful benefit of reporting is how it helps you to make decisions, identify opportunities, and celebrate success.

Think about ways to make an impact on your Joint Venture members and their journey with the Business team. Some questions to help include:

- What are you able to do when you generate a report that's sorted by member usage? How will your analysis affect your customer?
- How does the information you see in reporting affect the renewal rate?

Net New

The JV Net New metric is the number of new or renewed memberships minus the number of memberships expired per week. A positive weekly number indicates success.

Frequently Asked Questions

What should I know about handling returns of Joint Venture memberships?

Whenever possible, a Joint Venture membership return should be handled by a Business team member. Joint Venture memberships can be returned within 14 days if none of the services have been used—which must be validated through Concierge Admin. Memberships can not be returned if the customer has participated in any Joint Venture services, such as Setup, Training, or Exclusive Workshops.

If a new Joint Venture customer decides to return the Mac or iOS device that provided Joint Venture eligibility, you must also return the customer's Joint Venture membership, even if the customer has already participated in Joint Venture services. All memberships are refunded at the full price—in other words, not prorated. When the product is returned, coverage for additional systems added to the Joint Venture membership must also be returned. Consult your Business team if the customer asks to transfer coverage to other hardware.

Does Apple offer discounts for the Joint Venture program?

No. The Joint Venture program is not eligible for discounts. Discounts for business, education, employee purchase plans, and government and corporate employees do not apply.

How do I reinstate a membership that was canceled?

You cannot reinstate a membership after it has been canceled. Depending on the case, you must sell a new one or provide a complimentary membership. Partner with your Business Manager/Business Leader for case specific resolution.

Note:

For other program-related questions, contact storesupport@apple.com.

Can Joint Venture be purchased for an individual, non-Business user?

No. Joint Venture membership is offered to businesses only, and Apple reserves the right to verify a business' status, and either reject or cancel a membership in its reasonable discretion.

Where can I learn more about administering Joint Venture through Concierge Admin?

The Concierge Admin User Guide provides information about Joint Venture in the section on managing memberships. You can find the guide in RetailMe at:

Materials > Systems > Concierge > Concierge Admin User Guide

I have a problem with [activation, the member website, not receiving an activation code, Concierge]. What should I do?

Submit an IS&T Help Ticket and call to have it escalated to P2. Ask IS&T to direct your ticket to the Joint Venture team and assign it to the Apple Production Support (APS) workgroup. Please provide:

- POS transaction number
- Membership number
- Customer name
- Customer email address
- Screen shots of errors or issues you see

My customer wants a Genius callback but can't log in to the member website—what should I do?

Follow these steps to schedule a Genius callback:

- Go to the member page in Concierge Admin.
- Choose Call Center.
- Choose Create Call Reservation.
- Enter the member's Apple ID to create an appointment.

Is the Family Room's participation in Joint Venture services reported?

Yes. Reporting for Joint Venture activities are visible on the Family Room Dashboard. If you have questions, contact your Field Leader.

A member cancelled a training, but the member's hours still appear as "used." What can I do?

Open a ticket with IS&T to request that the training hours are reapplied to the membership. How do I view and confirm requested company trainings, or cancel a company training?

1. Log in to Concierge Admin.
2. Move the cursor over the house icon.
3. Select Company Training.

Joint Venture RetailMe Lessons

Joint Venture Features and Benefits

Joint Venture—Part of a Complete Solution

Joint Venture: Talking about the Program with Your Customers

Joint Venture Resources

Joint Venture Loaner Guide

Joint Venture Member Dashboard User's Guide

Joint Venture Program Guide

JV Workshop Guide

Genius Callback Guide

Concierge Admin User Guide